

# CONREP – Con Update User

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## Using the CONREP Data System

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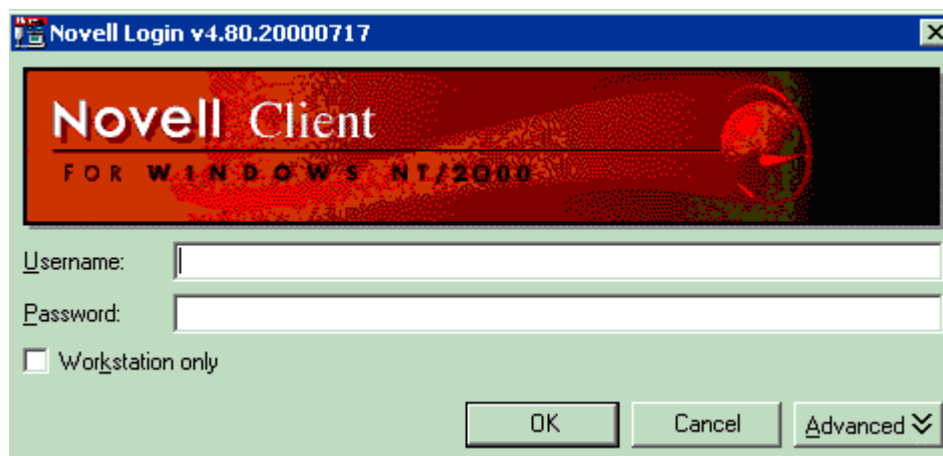
## **Trouble-Shooting**



## Logging into Novell

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The Novell Security System offers network capability while providing accelerated network security. The Novell Login both allows appropriate users access to the CONREP data system and protects confidential CONREP patient information.



Step	Instruction	System Response						
1	Enter designated user's name in the <b>Username</b> field.							
2	Enter the appropriate Novell password in the <b>Password</b> field.							
3	Click on the <b>Workstation only</b> check box.							
4	Click on the <b>OK</b> button.  <b>Note:</b> Should the system deny access follow system instructions in the pop up boxes to clear up login issue.	<div>The Novell system will verify that the user has network clearance.</div> <table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Have clearance</td><td>The system will open the CONREP Data System</td></tr><tr><td>Do not have clearance</td><td>Novel will not allow that user to login.</td></tr></table>	If you ...	Then...	Have clearance	The system will open the CONREP Data System	Do not have clearance	Novel will not allow that user to login.
If you ...	Then...							
Have clearance	The system will open the CONREP Data System							
Do not have clearance	Novel will not allow that user to login.							

## Logging into the CONREP Data System

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The CONREP login screen allows eligible users to access the CONREP data system. Since users have various levels of security rights, this login screen insures that each user logging in has the appropriate security clearance.



Login

CALIFORNIA DEPARTMENT OF  
Mental Health

User Name:

Password:

Server:

Database:

Step	Instruction	System Response
1	Enter designated user's name in the <b>User Name</b> field.	
2	Enter the appropriate System password in the <b>Password</b> field.	
3	Select the server in the <b>Server</b> drop-down.  <b>Note:</b> In most instances this field will not be changed as system is set to default to the most current Server/Database.	
4	Select CONREP in the <b>Database</b> drop-down.  <b>Note:</b> In most instances this field will not be changed as system is set to default to the most current Server/Database.	

5	<p>Click on the <b>Login</b> button or press <b>Enter</b>.</p> <p><b>Note:</b> Should the system deny access follow system instructions in the pop up boxes to clear up login issue.</p>	<p>The CONREP system will verify that the user has system clearance.</p> <table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Have clearance</td><td>The system will open the CONREP patient screen.</td></tr><tr><td>Do not have clearance</td><td>The CONREP System will not allow that user to login.</td></tr></table>	If you ...	Then...	Have clearance	The system will open the CONREP patient screen.	Do not have clearance	The CONREP System will not allow that user to login.
If you ...	Then...							
Have clearance	The system will open the CONREP patient screen.							
Do not have clearance	The CONREP System will not allow that user to login.							
6	<p>Click on the <b>Clear</b> button.</p>	<p>This will clear The User Name and Password fields.</p>						

## Change Password

The CONREP Data System will allow the user to change their password. Passwords must be changed immediately if compromised. Additionally, as a security precaution, passwords should be changed on average once per month to prevent unauthorized individuals from gaining access to sensitive data. Passwords must be at least 8 characters and one character must be a number.

**Change Password**

CALIFORNIA DEPARTMENT OF  
**Mental Health**

User Name: testuser\_cu2

New Password:

Verify New Password:   
(tab off field to change password)

Step	Instruction	System Response
1	Login to system using the, <b>"Logging into the CONREP System,"</b> instructions.	
2	Click on the <b>Change Password</b> button.	The system will open the Change Password pop up screen.
3	Enter new password in the field <b>New Password</b> .	
4	Retype password in the field <b>Verify New Password</b> .	
5	Hit the <b>Tab</b> key.	The System will enable the Change button.
6	Click on the <b>Change Password</b> button.	The system will update the login password to reflect the newly entered password.
7	Click on the <b>Clear</b> button.	The system will clear the two password fields.

## Set Up New Server Connection

The CONREP Data System will allow the user to make new connections to servers or switch from one server connection to another. A change in server connection would occur **only** if DMH switched to an alternate server or added a new server. Users are cautioned not to change server connections unless and until DMH notifies of such change.

**Setup Login Configuration**

Connection List			
Server	Database	Default DB	Alias
MHAPST02	ConRep	True	CON REP DEVELOPMENT

Server:  Alias:   
 Database:  Default: ☐

Step	Instruction	System Response
1	Click on a server name from the <b>List Box</b> .	The system will select the chosen server.
2	Click on the <b>Exit</b> button.	The system will bring user back to the login screen.

## Add a New Server Connection

The CONREP Data System will allow the user to add a server connection to the system connection list. Users are cautioned not to add new server connections unless and until DMH notifies of such change.

The screenshot shows a 'Setup Login Configuration' window. It features a 'Connection List' table with the following data:

Server	Database	Default DB	Alias
MHHAPST02	ConRep	True	CON REP DEVELOPMENT

Below the table, there are input fields for 'Server:', 'Database:', 'Alias:', and 'Default:'. At the bottom, there are five buttons: 'Cancel', 'Save', 'Add', 'Delete', and 'Exit'.

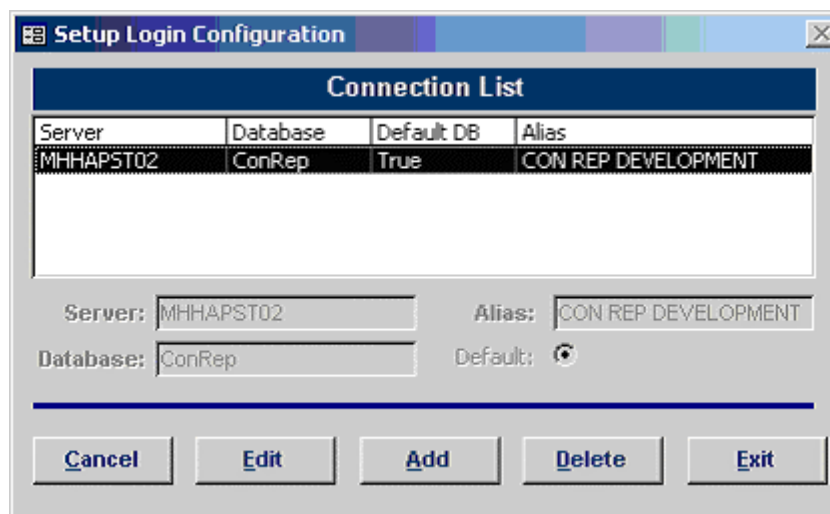
Step	Instruction	System Response
1	Click on <b>Setup</b> in the Login Screen.	The system will display the Setup Login Configuration Screen.
2	Click on the <b>Add</b> button.	The system will disable the Connection list and enable the Server, Database, Alias and Default fields.
3	Enter the new server name in the <b>Server</b> field.	
4	Enter the database name in the <b>Database</b> field.	
5	Enter the database alias in the <b>Alias</b> field.	



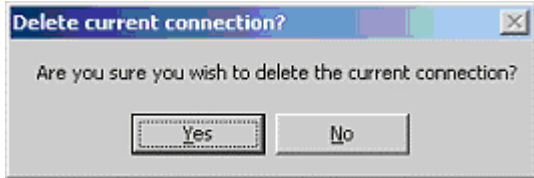
6	Select the <b>Default</b> radio button.	
7	Click on the <b>Save</b> button.  <b>Note:</b> When the default radio button is selected, the server/database conditions that were saved are now defaulted in the login screen.	The system will update and save all new conditions entered by the user.

## Delete a Server Connection

The CONREP Data System will allow the user to delete obsolete or unused servers from the system connection list. Users are cautioned not to delete server connections unless and until DMH notifies of such change.



Step	Instruction	System Response
1	Click on <b>Setup</b> in the Login Screen.	The system will display the Setup Login Configuration Screen.
2	Select the server to be deleted from the List box.	The system will enable the delete button.

3	Click the <b>Delete</b> button.	<p>The system will enable a warning message box:</p>  <p><b>Note:</b> If a connection is deleted the user must recreate that connection by following instructions in the <a href="#">Add New Server Connection</a> Section.</p>
4	Click the <b>Yes</b> button.	The system will delete the server connection.

## Logging off the CONREP Data System

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Users must always click on the **Quit** Button on the menu bar to log off the CONREP data System. The Quit function allows the user to log off the database as well as the network server and allows the database to effectively shut itself down.

Clicking the “**X**” on the right hand corner of the data system screen will log the user off the database but not the network server, which will result in unnecessary server traffic.

## Patient Information/Episode Information

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The purpose of the Patient Screen is to track movement of CONREP patients to allow for monitoring of core service compliance and to meet Department of Justice patient status reporting requirements. CONREP Providers are required to submit patient admission, discharge, or change in patient status (i.e., AWOL, NA, Transfer) information within three business days of such occurrence.

To make a patient record complete/active the demographic fields must be completed in the Info and Care Level screens. When a record is complete, the Record Indicator will display a green indicator stating “Complete”.

**CONREP - [CONREP Patients]**

File Edit Insert Records Window Help

Patients Contractors Reports Change Password Quit CONREP Help

**Add New Patient/Episode** Role Admission ID C I & I Patient ID Program Type Care Level Contractor

CONUPDATE 4611 M12121212 3452 CONREP INTENSIVE DMH Test Contractor 2

**CONREP Patients** Complete First/MI/Last: JOHN DOE

Last Name: or C I & I: Show All Advanced... Find

C I & I	Patient Name	Adm Date
CII	Patient Name	

AKAs Other IDs

Record: 14 of 1

Ready

**Info** Care Level/Waiver Diagnosis AWOL/NA Claims Transfer Discharge History

Status: ACTIV Legal Class: PC 1370 (1ST)

Program Type: CONREP Effective Date:

Commit Only: Los Angeles Race: Unknown

Residence Only: Lake Education Level: none, kindergarten

Controlling Offense: Find Code Marital Status: Now Married, Rem

Admission Date: 05/29/2002 Gender: Female

Birth Date: 04/26/1949

Admit From: Community

Hospital: Case #:

**Registered Offenses (Check all that apply)**

☒ None ☐ Drug/Narcotics Offender

☐ Arson ☐ Sex Offender

**Disability (Check all that apply)**

☒ None ☐ Physical

☐ Blind ☐ Developmental

☐ Deaf ☐ Other

☐ Speech ☐ Unknown

## Add New Patient/Episode

All patient admissions to the Conditional Release Program must be entered in the CONREP Data System. Prior to adding a patient admission, the user must first check whether or not a patient was previously in CONREP. If the patient has never been in CONREP, the user would complete an "Add New Patient" transaction. If the patient was previously in CONREP, the user would then complete a "New Episode" transaction.

**Add New Patient / Episode**

**Step 1. Check if patient is already in system:**

Patients:

CII Nbrs:

**Step 2. If patient is not in system, please fill out the following fields:**

CI&I Prefix:  CI&I Number:

First Name:  M.I.:  Last Name:

Add Cancel

Step	Instruction	System Response									
1	Click on the <b>Add New Patient/Episode</b> Button.	The Add New Patient/Episode screen appears.									
2	<div>Go to step one and check both the <b>Patients</b> and <b>CII Nbrs</b> drop-down boxes to determine type of admission.</div> <table><tr><th>If...</th><th>Then...</th></tr><tr><td rowspan="3">Patient's name or CII # appears on the drop-down box</td><td>Patient has previously enrolled in the system</td></tr><tr><td>Select patient record and verify name/CII#/DOB</td></tr><tr><td>Skip to Step 5</td></tr><tr><td rowspan="2">Patient's name or CII # DOES NOT appear on the drop-down box</td><td>Patient has not previously enrolled in the system</td></tr><tr><td>Go to Step 3</td></tr></table>	If...	Then...	Patient's name or CII # appears on the drop-down box	Patient has previously enrolled in the system	Select patient record and verify name/CII#/DOB	Skip to Step 5	Patient's name or CII # DOES NOT appear on the drop-down box	Patient has not previously enrolled in the system	Go to Step 3	
If...	Then...										
Patient's name or CII # appears on the drop-down box	Patient has previously enrolled in the system										
	Select patient record and verify name/CII#/DOB										
	Skip to Step 5										
Patient's name or CII # DOES NOT appear on the drop-down box	Patient has not previously enrolled in the system										
	Go to Step 3										
3	If the patient was not previously enrolled in the system, complete all fields in <b>Step 2</b> in the Add New Patient/Episode Screen.										
4	Hit the <b>Tab</b> key.	The system will enable the Add button.									
5	Click on the <b>Add</b> button.	The System will create a new admission record and Admission ID. (If new patient admission, the system will create a new Patient ID.) The patient status is automatically updated to Pending and the Record Indicator will state "Incomplete".									

6	<p>Use the drop-down boxes to complete the following fields:</p> <p><b>Program Type</b> <b>Commit Cnty</b> (Commitment County) <b>Residence Cnty</b> (Residence County) <b>Race</b> <b>Education Level</b> <b>Marital Status</b> <b>Gender</b></p> <p><b>Note:</b> After the record is complete, the Status field is auto-filled by the system to reflect the patient status. (In this instance it will show an “active” status)</p>							
7	Click on the <b>Find Code</b> button to locate the Controlling Offense.	The system will enable the Advanced Search screen. (See <a href="#">Advanced Search</a> for further information.)						
8	Click on the first field drop down and select Penal Code.	The system will default to “Contains Item” in the second field drop down.						
9	Type in one or more digits of the desired Penal Code in the third field drop down and tab.	The system will default to “And” in the fourth drop down.						
10	Click on the <b>Add</b> button	The system will display the selected Penal Code information in the Criteria box.						
11	Click on the <b>Search</b> button	The system will display all Penal Codes matching the selected criteria.						
12	<table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Click on <b>Detail</b></td><td>The system will add the selected Penal Code to the Info Screen</td></tr><tr><td>Click on <b>Exit</b></td><td>The system will not update the Penal Code</td></tr></table>	If you ...	Then...	Click on <b>Detail</b>	The system will add the selected Penal Code to the Info Screen	Click on <b>Exit</b>	The system will not update the Penal Code	
If you ...	Then...							
Click on <b>Detail</b>	The system will add the selected Penal Code to the Info Screen							
Click on <b>Exit</b>	The system will not update the Penal Code							

13	<b>Admit From</b> Use the drop-down box to select the location from which the patient was admitted											
	<table><tr><td><b>If you select...</b></td><td><b>Then...</b></td></tr><tr><td>Community</td><td>Skip to step 15</td></tr><tr><td>Hospital</td><td>Go to step 14</td></tr><tr><td>IMD</td><td>Skip to step15</td></tr><tr><td>Unknown</td><td>Skip to step 15</td></tr></table>	<b>If you select...</b>	<b>Then...</b>	Community	Skip to step 15	Hospital	Go to step 14	IMD	Skip to step15	Unknown	Skip to step 15	
<b>If you select...</b>	<b>Then...</b>											
Community	Skip to step 15											
Hospital	Go to step 14											
IMD	Skip to step15											
Unknown	Skip to step 15											
14	<b>Hospital</b> Select the correct hospital from the drop-down list.											
15	<b>Case #</b> Enter the most recent 6-digit Hospital Case number.											
16	Use the drop-down box to select the legal class.											
	<table><tr><td><b>If you select...</b></td><td><b>Then...</b></td></tr><tr><td>PC 2972</td><td>Enter the effective date</td></tr></table>	<b>If you select...</b>	<b>Then...</b>	PC 2972	Enter the effective date							
<b>If you select...</b>	<b>Then...</b>											
PC 2972	Enter the effective date											
17	Complete the <b>Admission Date</b> and <b>Birth Date</b> in the corresponding fields.  <b>Note:</b> Enter dates in mm/dd/yyyy format.											
18	Check applicable fields in <b>Registered Offenses</b> and <b>Disability</b> boxes.  <b>Note:</b> You must check None if no fields apply.											
19	Click on the <b>Care Level</b> tab and add the patient's Care Level.  <b>Note:</b> See Care Level for further information.	Patient <b>Status</b> is automatically updated to Active and the Record Indicator will state "Complete".										
20	Click on the Diagnosis tab and add the patient's Diagnosis.  <b>Note:</b> See Diagnosis for further information.											

## Search/View Patient Records

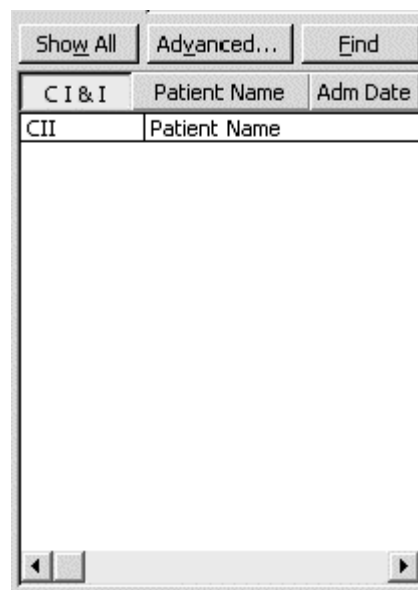
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The CONREP Data System provides the user with a variety of ways to search for and view patient records specific to their program. The Data System search engine allows the user to both search for individual patient records as well as search for patient records that fit specified criteria.



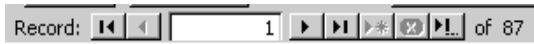
### Basic Search

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A basic search allows the user to search for patient information either by patient's last name or CI&I number. A user may only search for patients enrolled in their program.



Step	Instruction	System Response
1	<p>Enter either the patient's last name or CI&amp;I number.</p> <p><b>Note:</b> A partial last name or CI&amp;I number may be entered when performing a search.</p>	

2	<p>Click on the <b>Find</b> button.</p> <p><b>Note:</b> Scroll to the right on the patient return screen to see further information on a specific patient record.</p>	<p>The System will locate all patient names that match the typed criteria.</p> <p>If there are no matches to the criteria the following message box will pop up:</p> 
3	<p>Click on column header.</p> 	<p>The System will sort by the header categories in ascending order.</p> <p><b>Note:</b> System will sort by only one category at a time.</p>
4	<p>Select patient record.</p>	<p>The system will display patient information.</p> <p><b>Note:</b> System filter will allow the selected patient record to be viewed.</p>
5	<p>Click <b>Show All</b>.</p>	<p>The system will clear search filter and Records Navigator will allow access to all patient records.</p> 

## Advanced Search

The Advanced Search provides for flexibility in searching patient records. The criteria values vary and are specific to the screen from which the search is performed. For example search criteria such as care level, and admission date are available when performing an advanced search from the Info tab.

Additionally, the Advanced Search provides a number of parameters to assist users in tailoring a search, such as “contains item”, “doesn’t contain item” and “starts with”. Both criteria selection and parameters assist in locating records which match user specifications. A user may only search for patients enrolled in their program.



**Return Target:**

Search: Patient Admission RBeland, please select records you wish to return.

Field: [ ] [ ] [ ] [ ]

**Criteria**

Add  
Edit  
Delete  
Search

Sort 1: [ ] [v] Sort 2: [ ] [v] Sort 3: [ ] [v]

**Results**

Return All Unselect All Detail To Excel Report Help Exit

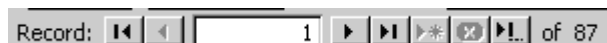
Step	Instruction	System Response
1	Select criteria from the <b>Field</b> drop-down.  <b>Note:</b> Criteria selection is dependent upon screen from which search is performed.	
2	Tab to the next drop-down	
3	Tab to the next field.	
4	Enter a <b>value</b> .	
5	Tab to the next drop-down.	





6	<p>Make a selection from the drop-down.</p> <table><tr><th>If you select...</th><th>Then...</th></tr><tr><td><b>And</b></td><td>The system assumes you may have more than one criteria that will be added to the criteria list box.</td></tr><tr><td><b>Or</b></td><td>The system assumes you may have one or another criteria that will be added to the criteria list box.</td></tr></table>	If you select...	Then...	<b>And</b>	The system assumes you may have more than one criteria that will be added to the criteria list box.	<b>Or</b>	The system assumes you may have one or another criteria that will be added to the criteria list box.	
If you select...	Then...							
<b>And</b>	The system assumes you may have more than one criteria that will be added to the criteria list box.							
<b>Or</b>	The system assumes you may have one or another criteria that will be added to the criteria list box.							
7	Click on the <b>Add</b> button.	The system will add the criteria to the criteria list.						
8	<table><tr><th>If ...</th><th>Then...</th></tr><tr><td>That is the only criteria</td><td>Go to step 9</td></tr><tr><td>There are more criteria</td><td>Go to step 1</td></tr></table>	If ...	Then...	That is the only criteria	Go to step 9	There are more criteria	Go to step 1	
If ...	Then...							
That is the only criteria	Go to step 9							
There are more criteria	Go to step 1							
9	Click on the <b>Search</b> button.	The system will search records to find all matches with the specified criteria.						
10	<table><tr><th>If ...</th><th>Then...</th></tr><tr><td>The system reports no records were found with the criteria.</td><td>Go to step 12</td></tr><tr><td>If the system reports record(s) in the return screen.</td><td>Go to step 15</td></tr></table>	If ...	Then...	The system reports no records were found with the criteria.	Go to step 12	If the system reports record(s) in the return screen.	Go to step 15	The system will sort in ascending order by the parameter selected.
If ...	Then...							
The system reports no records were found with the criteria.	Go to step 12							
If the system reports record(s) in the return screen.	Go to step 15							

11	Click on a criteria.		
	<b>Click on the...</b>	<b>Then...</b>	
	<b>Edit</b> button if the criteria needs to be edited	Go to step 13.	
	<b>Delete</b> button if the criteria needs to be deleted	Go to step 1.	
12	Enter the correct data in the search criteria fields by following steps 1-10.		
13	Select a parameter from the <b>Sort</b> drop-downs.		The system will sort in ascending order by the parameter selected.
14	Select pertinent records.		The records will be highlighted blue.
15	<b>If you ...</b>	<b>Then...</b>	
	Click on <b>Details</b> button	The system will filter those records to the patient screen where user can view details of those selected records.	
	Click on <b>Excel</b> button	The system will open and filter those selected records to an Excel document.	

## Scroll for Records

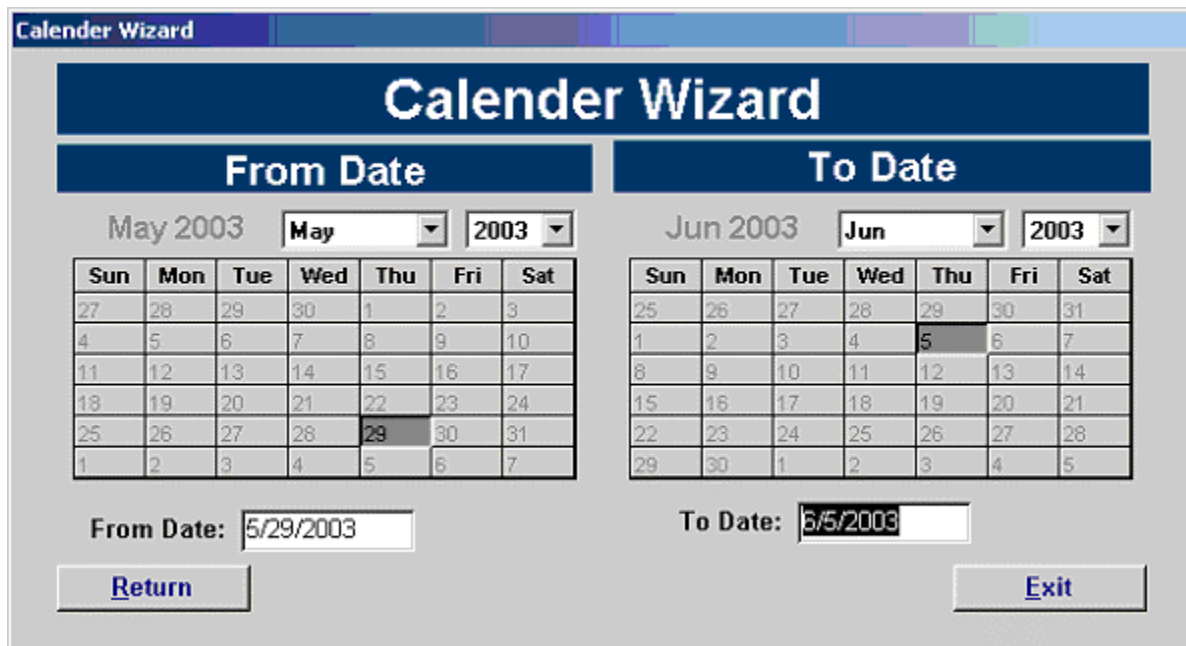
The record navigator allows the user to manually scroll through the individual records of patients enrolled in their program.



Step	Instruction	System Response
1	Click  navigation button	The system moves forward one patient record at a time.
2	Click  navigation button	The system moves to the last patient record.
3	Click  navigation button	The system moves back one patient record at a time.
4	Click  navigation button	The system moves to the first record.

## Calendar Wizard

The Calendar Wizard is a tool wherein the user can view and choose dates in a calendar format when entering various patient and contractor transactions. The Calendar Wizard defaults to the current month but will allow the user to choose dates from previous months.



**Calendar Wizard**

**From Date**

May 2003    May    2003

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

From Date: 5/29/2003

[Return](#)

**To Date**

Jun 2003    Jun    2003

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

To Date: 6/5/2003

[Exit](#)

Step	Instruction	System Response
1	Double Click on the desired date on the <b>From Date</b> section on the Calendar.	The system will update the From Date at the bottom of the Calendar Wizard with the selected date.

2	Double Click on the desired date on the <b>To Date</b> section on the Calendar.	The system will update the To Date at the bottom of the Calendar Wizard with the selected date.
3	Click on the <b>Return</b> button.	The system will update the corresponding date fields as well as close down the Calendar Wizard.

## Edit Patient Records

Patient records in the Info tab should be updated to reflect demographic changes as they occur. Patient records may be edited as long as the patient's status is Active (i.e., Active, AWOL, NA). All fields are available for edit except the Status field, which is automatically updated by the system. If checked, the None check box must be unchecked before updating Registered Offenses and/or Disability information.

The screenshot shows the 'CONREP Patients' application window. The title bar reads 'CONREP - [CONREP Patients]'. The menu bar includes 'File', 'Edit', 'Insert', 'Records', 'Window', and 'Help'. The toolbar contains icons for 'Patients', 'Contractors', 'Reports', 'Change Password', 'Quit', and 'CONREP Help'. Below the toolbar, there are input fields for 'Add New Patient/Episode', 'Role' (CONUPDATE), 'Admission ID' (4611), 'C I & I' (M12121212), 'Patient ID' (3462), 'Program Type' (CONREP), 'Care Level' (INTENSIVE), and 'Contractor' (DMH Test Contractor 2). A green oval highlights the word 'Complete' in the center. Below this, there are fields for 'First/MI/Last' (JOHN) and 'DOE'. The main area is divided into tabs: 'Info', 'Care Level/Waiver', 'Diagnosis', 'AWOL/NA', 'Claims', 'Transfer', 'Discharge', and 'History'. The 'Info' tab is active, showing fields for 'Status' (ACTIVE), 'Legal Class' (PC 1370 (1ST)), 'Effective Date', 'Program Type' (CONREP), 'Commit City' (Los Angeles), 'Residence City' (Lake), 'Controlling Offense' (12022.6 PC - WITH PROPERTY DAMAGE), 'Admit From' (Community), 'Hospital', 'Case #', 'Admission Date' (05/29/2002), and 'Birth Date' (04/26/1949). There are also checkboxes for 'Registered Offenses' (None, Arson, Drug/Narcotics Offender, Sex Offender) and 'Disability' (None, Blind, Deaf, Speech, Physical, Developmental, Other, Unknown). The bottom status bar shows 'Record: 14 of 1' and 'Ready'.

## View/Print Patient List

The system allows the user to view and/or print patient lists while in the Patients tab of the Contractors screen. The Patients tab defaults to a list of the CONREP Provider's historical patients and also allows the user to search for patients based on their admission status. Users may only view and/or print patient lists for patients enrolled in their program.

The screenshot shows the 'CONREP Contractors' application window. The 'Patients' tab is selected. At the top, there are tabs for 'Current Info', 'Contracts', 'Patients', 'Claims', and 'Contracts'. A 'Contractor' dropdown menu is set to 'DMH Test Contractor 2'. Below this, there is a 'Select Admission Status' dropdown menu and a 'Show All' button. A table displays patient information with columns: Patient, CII, Legal Class, Prog. Type, Care Level, Admitted, and Discharged. The first row shows 'DOE, JOHN', 'M12121212', 'PC 1026 (NGI)', 'CONREP', 'INTENSIVE', '4/1/2003', and an empty 'Discharged' field. At the bottom left, a 'Count of Patients' field shows '1'. A 'Print' button is located at the bottom right.

Step	Instruction	System Response
1	Click on the <b>Contractor</b> button.	The system will display the Contractor screen.
2	Select the <b>Patients</b> tab.	The system will display all patient names specific to program.
3	Click on <b>Select Admission Status</b> drop down.	The system allows user to select criteria for a patient search.
4	Click on column header.  <div> Patient CII Legal Class Prog. Type Care Level Admitted Discharged </div>	The system will sort by the header categories in ascending order.  <b>Note:</b> System will sort by only one category at a time.

5	Click on the <b>Print</b> button.	The system will print a report of all patients displayed on the screen.
6	Click on the <b>Show All</b> button.	The system will clear the search filter.

## Diagnosis

A diagnosis is a label applied to a patient by a physician or mental health professional after confirming the presence of those symptoms and/or behaviors that define the psychiatric disorder. Every CONREP patient will have, at minimum, an Axis I Primary diagnosis, which must be reflected in the Diagnosis tab of the Patients screen.

## Add a New Diagnosis

Upon admission, or as soon as known, patient diagnosis information must be entered in the Diagnosis tab. Users must enter an Axis I Primary diagnosis, however a patient may or may not have an Axis I Secondary and/or Axis II diagnosis. Discharge diagnosis information will be added in the Discharge tab rather than the diagnosis tab (see [Discharging a Patient](#) for further information).

The screenshot shows a window titled "Add Diagnosis". Inside, there are three dropdown menus. The first is labeled "Axis I Primary:", the second "Axis I Secondary:", and the third "Axis II:". Below these menus are two buttons: "Add" and "Exit".

Step	Instruction	System Response
1	Click on the <b>Add</b> button.	The system will display the Add Diagnosis screen.
2	Select or type in the <b>Axis I Primary</b> drop-down.	The system will allow the user to find the desired diagnosis.  <b>Note:</b> Axis I Primary diagnosis must be entered.
3	Select or type in the <b>Axis I Secondary</b> drop-down.	The system will allow the user to find the desired diagnosis.
4	Select or type in the <b>Axis II</b> drop-down.	The system will allow the user to find the desired diagnosis.

## View Diagnosis

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The system allows the user to view current diagnosis information by first locating the patient record to be viewed and then clicking on the Diagnosis tab for the selected patient. Users may only view Diagnosis information for patients enrolled in their program.

## Edit an Existing Diagnosis

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The system allows the user to edit incorrect diagnosis information by first locating the patient record to be edited and then clicking on the Diagnosis tab for the selected patient. If a second diagnosis is added in error, contact CONREP Operations for further assistance.



Info	Care Level/Waiver	Diagnosis	AWOL/NA	Claims	Transfer	Discharge
		Axis I Primary:	Axis I Secondary:	Axis II:		
Admit		1.3	290.00	290.10A		
		1.3	DISRUPTION OF FAMILY BY SEPARATION	DSM4		
		2	Legacy DSM IV Code			
		2.	PROBLEMS RELATED TO THE SOCIAL E	DSM4		
		290.0	DEMENTIA OF THE ALZHEIMER'S TYPE,	DSM4		
		290.00	Legacy DSM IV Code			
		290.0A	DEMENTIA OF THE ALZHEIMER'S TYPE,	DSM4		
		290.10	DEMENTIA DUE TO MEDICAL CONDITIO	DSM4		
		290.10A	DEMENTIA DUE TO CREUTZFELDT-JAK	DSM4		

## AWOL/NA (Movement)

Whenever a patient is determined to be AWOL (absent without leave) or becomes NA (not available), CONREP Providers are required to submit this status change within three business days of such occurrence. (A patient is defined as AWOL when he/she is not receiving treatment or supervision as ordered by the court. A patient is NA when incarcerated or hospitalized for medical or psychiatric reasons.)

## Placing a Patient on AWOL or NA Status

AWOL or NA status information must be entered in the CONREP Data System each time a patient becomes AWOL or NA from a CONREP Program. The system allows the user to add AWOL or NA information by first locating the patient record and then clicking on the AWOL/NA tab for the selected patient.

Add AWOL/NA

Movement Type:

Went On Date:

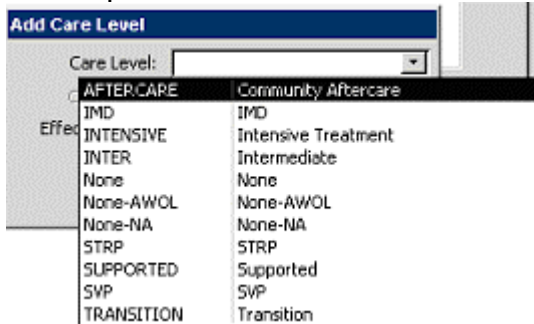
NA Reason:

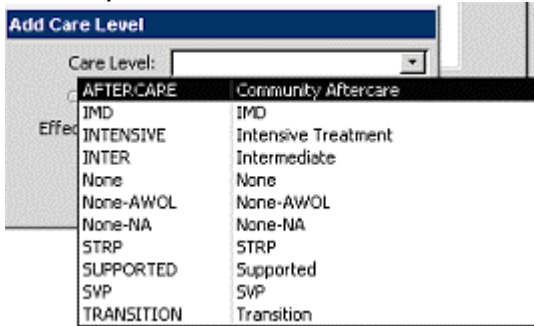
Return Date:

Comments:

Font Size: B

Add
Cancel

Step	Instruction	System Response						
1	Select the patient record.	The system will display the patient's record.						
2	<table border="1"><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Add an AWOL</td><td>Go to step 3</td></tr><tr><td>Add an NA</td><td>Skip to step 16</td></tr></table>	If you ...	Then...	Add an AWOL	Go to step 3	Add an NA	Skip to step 16	
If you ...	Then...							
Add an AWOL	Go to step 3							
Add an NA	Skip to step 16							
3	Select the <b>Care Level/Waiver</b> tab.	The system will display the Care Level screen for the patient's record.						
4	Click on the <b>Add New Care Level</b> button.	Add Care Level pop up screen will appear.						
5	Select <b>None-AWOL</b> from the Care Level drop-down.	The system will add that selection to the drop-down. 						
6	Enter the Effective date and hit the <b>Tab</b> key.  <b>Note:</b> The effective date is the same as the AWOL date.	The system will enable the Add button.						
7	Click on the <b>Add</b> button.	The patient record is updated.						
8	Select the <b>AWOL/NA</b> tab.	The system will show the AWOL/NA screen for the patients record.						
9	Click on the <b>Add AWOL/NA</b> button.	The Add AWOL/NA pop up screen appears.						
10	Select <b>AWOL</b> from the <b>Movement Type</b> drop-down box.	The Movement Type will be updated and the NA Reason Drop down is disabled.						
11	Click on the Calendar button or type in the date for the <b>Went on Date</b> field.  <b>Note:</b> See the <a href="#">Calendar Wizard</a> section for further information.							

12	Enter status of legal proceedings and other relevant information in the <b>Comments</b> field.	
13	Click on the <b>Add</b> button.	The system will update the patient's record.
14	Select the <b>Care Level/Waiver</b> tab.	The system displays the Care Level screen for the patient's record.
15	Click on the <b>Add Care Level</b> button.	The Add Care Level pop up screen will appear.
16	Select <b>None-NA</b> from the Care Level drop-down.	<p>The system will add that selection to the drop-down.</p> 
17	<p>Enter the Effective date and hit the <b>Tab</b> key.</p> <p><b>Note:</b> The effective date is the same as the AWOL date.</p>	The system will enable the Add button.
18	Click on the <b>Add</b> button.	The patient Care Level is updated.
19	Select the <b>AWOL/NA</b> tab.	The system will display the AWOL/NA screen for the patient's record.
20	Click on the <b>Add AWOL/NA</b> button.	The Add AWOL/NA pop up screen will appear.
21	Select <b>NA</b> from the <b>Movement Type</b> drop-down box.	The NA Reason Drop down becomes enabled.
22	Make a selection from the <b>NA Reason</b> drop-down	
23	<p>Click on the Calendar button or type in the date for the <b>Went on Date</b> field.</p> <p><b>Note:</b> See the <a href="#">Calendar Wizard</a> section for further information.</p>	

24	Enter the status of legal proceedings and other relevant information in the <b>Comments</b> field.	
25	Click on the <b>Add</b> button.	The system will update the patient's record.

## Viewing an AWOL/NA Status Record

The system allows the user to view AWOL and NA information by first locating the patient record to be viewed and then clicking on the AWOL/NA tab for the selected patient. Users may only view AWOL/NA information for patients enrolled in their program.

The screenshot shows a web-based interface for viewing patient records. The 'AWOL/NA' tab is active. The interface displays two rows of data for AWOL/NA status. The first row shows 'AWOL' status with dates 05/02/2003 to 05/03/2003. The second row shows 'NA' status with date 05/04/2003. Each row has a 'Delete' button and a 'Comments' field. At the bottom, there is a 'Record:' section with navigation buttons and a page indicator '1 of 2'. A 'Add AWOL/NA' button is located at the bottom right.

## Edit an AWOL/NA Status Record

The system allows the user to edit AWOL/NA information by first locating the patient record to be edited and then clicking on the AWOL/NA tab for the selected patient. If a patient is placed on AWOL/NA status in error, contact CONREP Operations for further assistance.

Info	Care Level/Waiver	Diagnosis	AWOL/NA	Claims	Transfer	Discharge	History
AWOL/NA/IMD NA Reason Went On Date Return Date							
AWOL			05/02/2003	05/03/2003	Delete		
Comments:							
NA		STATE	05/04/2003		Delete		
Comments:							
Add AWOL/NA							
Record: 1 of 2							

Step	Instruction	System Response
1	Click on the desired field.	
2	Make changes to <b>Movement Type</b> , <b>Dates</b> or <b>Comments</b> as necessary.	The system will update the record.

## Returning a Patient to Active Status

The patient record must be updated to reflect his/her return to the CONREP Program from AWOL or NA status. The system allows the user to return a patient from AWOL or NA by first locating the patient record and then clicking on the AWOL/NA tab for the selected patient.

Info	Care Level/Waiver	Diagnosis	AWOL/NA	Claims	Transfer	Discharge	History
AWOL/NA/IMD NA Reason Went On Date Return Date							
AWOL			05/02/2003	05/03/2003	Delete		
Comments:							

Step	Instruction	System Response
1	Select <b>patient record</b> .	
2	Select <b>AWOL/NA</b> tab.	The system will display AWOL/NA record.
3	Type the patient's return date in the <b>Return</b> field.	The system will update record to reflect Active status.
4	Select <b>Care Level/Waiver</b> tab.	The system will display the Care Level/Waiver screen.
5	Click on the <b>Add a Care Level</b> button  <b>Note:</b> See <a href="#">Care Level</a> for further information.	Patient's Care Level will be updated.

## Claims

The function of the Claim screen is to allow providers to submit Negotiated Net Amount (NNA)/Core Service and Negotiated Rate (NR) claim data for contract monitoring and payment purposes. CONREP Providers are to report all services provided to patients, including those services not funded under contract.

**CONREP Contractors**

Current Info | Contracts | Patients | **Claims** | Contracts

Contractor:

Service From:  Funding Code:  Service Type:  Patient Name:  **Find**

Service Thru:  Claim Type:  **Clear**

Service	NR-NNA	Service Date	Patient Name	Rate	TT Units	Am: Billed	Fund	Entered	Submit	Submit Date
---------	--------	--------------	--------------	------	----------	------------	------	---------	--------	-------------

Total Billed:  Total Units:  **Add Claim** **Edit Claim** **Print**

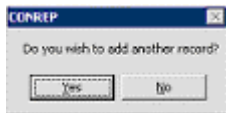
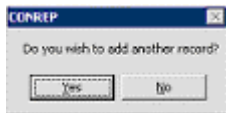
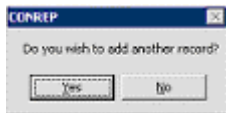
## Add New Claims

NNA/Core Service and NR claims must be entered on a monthly basis by the 15<sup>th</sup> of the month following the month of service. The system allows the user to add new and corrected claims for the existing Fiscal Year (FY) and prior two FY's.

The screenshot shows the 'Add Claims' window with the following fields and controls:

- Contract:** A dropdown menu.
- Service:** A tabbed interface with 'Type', 'Service', 'Rate', 'Units', 'Start Date', and 'End Date' tabs.
- Rate:** A table with columns for Service Type, Rate, and Claim ID.
- Units:** A table with columns for Service Type, Units, and Claim ID.
- Start Date:** A date picker.
- End Date:** A date picker.
- NNA:** Fields for Contract \$, Contract Units, YTD Units, and Pending Units.
- NR:** Fields for Contract \$, YTD \$, Pending \$, and Available \$.
- Comments:** A text area for entering comments.
- Buttons:** 'Add' and 'Cancel' buttons.

Step	Instruction	System Response
1	Click on the <b>Contractor</b> button.	The system will display the Contractor Screen.
2	Select the <b>Claims</b> tab.	The system will display the Claims screen.
3	Click on the <b>Add Claims</b> button	The Add Claims pop up screen will appear.
4	Select the fiscal year (FY) from the <b>Contract</b> drop-down.	The system will display all the contract services related to the selected Fiscal Year (FY).
5	Select Service Type from the <b>Service</b> List box.	

6	Select a patient name from the <b>Patient</b> drop-down and <b>Tab</b> to the next field.  <b>Note:</b> User can quickly locate patient name by typing in one or more letters of the patient's last name in the Patient drop-down field.							
7	Enter the number of units in the <b>Service Units</b> field and <b>Tab</b> to the next field.							
8	Select a service month from the <b>Service Date</b> drop-down and <b>Tab</b> to the next field.							
9	Select the funding code from the <b>Funding Code</b> drop-down and <b>Tab</b> .	The system will enable the Add button.						
10	<table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Click on the <b>Add</b> button.</td><td>The system saves claim and a pop up asks if you want to add another record.    Go to step 11</td></tr><tr><td>Click on the <b>Cancel</b> button.</td><td>System cancels claim and returns to Claims tab.</td></tr></table>	If you ...	Then...	Click on the <b>Add</b> button.	The system saves claim and a pop up asks if you want to add another record.    Go to step 11	Click on the <b>Cancel</b> button.	System cancels claim and returns to Claims tab.	
If you ...	Then...							
Click on the <b>Add</b> button.	The system saves claim and a pop up asks if you want to add another record.    Go to step 11							
Click on the <b>Cancel</b> button.	System cancels claim and returns to Claims tab.							
11	<table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Click on the <b>Yes</b> button.</td><td>System returns to add claims screen.</td></tr><tr><td>Click on the <b>No</b> button.</td><td>System returns to Claims tab.</td></tr></table>	If you ...	Then...	Click on the <b>Yes</b> button.	System returns to add claims screen.	Click on the <b>No</b> button.	System returns to Claims tab.	
If you ...	Then...							
Click on the <b>Yes</b> button.	System returns to add claims screen.							
Click on the <b>No</b> button.	System returns to Claims tab.							



## View/Search Patient Specific Claims

The system allows the user to search and view all claims for a specific patient by accessing the Claims tab in the Patient screen. To view claims for multiple patients, see View/Search Contract Specific Claims. Users may only search and view claims information for patients enrolled in their program.

The screenshot displays the 'Claims' tab within a patient's record. At the top, a navigation bar includes tabs for 'Info', 'Care Level/Waiver', 'Diagnosis', 'AWOL/NA', 'Claims' (which is selected), 'Transfer', 'Discharge', and 'History'. Below this, a search form contains the following fields: 'Admitted' with the value '04/01/2003', 'Discharged' (empty), 'Funding Code' (empty), 'Service From' (dropdown menu), and 'Service Thru' (dropdown menu). To the right of these fields are 'Find' and 'Clear' buttons. Below the search form is a table with the following columns: 'Service Date', 'Service Type', 'Units', and 'Contractor'. The table is currently empty.

Step	Instruction	System Response
1	Select <b>patient name</b> .  <b>Note:</b> See <a href="#">Search/View Patient</a> Record for further information on Patient Search.	Patient record will display.
2	Select the <b>Claims</b> tab.	The Claims screen will appear with all related patient claims displayed.
3	Select desired criteria:  <b>Funding Code</b> <b>Service From</b> <b>Service Through</b>	
4	Click on the <b>Find</b> button.	The system will display all claim records with specified criteria.

5	Click on column header.	The system will sort by the header categories in ascending order.  <b>Note:</b> System will sort by only one category at a time.
6	Click on the <b>Clear</b> button.	The system will reset and display all claims for the patient and clear all search criteria.

## View/Search Contract Specific Claims

The system allows the user to search and view all claims for either a specific patient or multiple patients by accessing the Claims tab in the Contract screen. Additionally, the user can tailor their search by Service or Claim Type if desired. Users may only search and view claims information for patients enrolled in their program.

The screenshot shows the 'Claims' tab in the CONREP Data System. At the top, there are tabs for 'Current Info', 'Contracts', 'Patients', 'Claims', and 'Contracts'. The 'Claims' tab is active. Below the tabs, there are search filters: 'Service From' (04/2003), 'Service Thru' (04/2003), 'Funding Code' (CONREP Fund), 'Service Type' (dropdown), 'Patient Name' (dropdown), and 'Claim Type' (dropdown). There are 'Find' and 'Clear' buttons. Below the filters is a table with columns: Service, NR-NNA, Service Date, Patient Name, Rate, TI Units, Amt Billed, Fund, Entered, Submit, and Submit Date. The table contains one row: 15/50, NNA, 200304, DOE, JOHN, \$0.00, 4, \$0.00, C01, 5/1/2003, False, 5/1/2003. At the bottom, there are summary fields: 'Total Billed: \$0.00' and 'Total Units: 0'. There are also 'Add Claim', 'Edit Claim', and 'Print' buttons.

Step	Instruction	System Response
1	Select the desired search criteria.  <b>Note:</b> The user can select more than one criteria.	
2	Click on the <b>Find</b> button.	The system will display all claim records with specified criteria.

3	Click on column header.	The system will sort by the header categories in ascending order.  <b>Note:</b> System will sort by only one category at a time.
4	Click on the <b>Clear</b> button.	The system will clear all claims information as well as search criteria.

## Edit Claims

The system allows the user to edit incorrect claims prior to the monthly submission cut-off date, which occurs by close-of-business on the 15<sup>th</sup> of every month. To verify claims available for editing, perform a claims search (see View/Search Contract Specific Claims for instructions); claims available for edit have a “Submit” message of “False”.

**Update Claims**

Contract:

Service:

Type	Service	Rate	Units	Start Date	End Date
NNA	15/50	0	0	07/01/2002	06/30/2003 23

Service Type:  Rate:

Provider:

Claim Amount:  Claim ID:

Date Entered:  Date Submitted:

Patient:

Service Units:  Service Date:  Funding Code:  ☐ Submitted

**Summary:**

NNA:	Contract \$	Contract Units	YTD Units	Pending Units
CONREP NNA:	<input type="text" value="\$100,000.00"/>	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value=""/>

Contract ID:

NR:	Contract \$	YTD \$	Pending \$	Available \$
CONREP NR:	<input type="text" value="\$50,000.00"/>	<input type="text" value="#Error"/>	<input type="text" value="#Error"/>	<input type="text" value="#Error"/>
Non-CONREP:	<input type="text" value="#Error"/>	<input type="text" value="#Error"/>	<input type="text" value="#Error"/>	<input type="text" value="#Error"/>

Comments:

Step	Instruction	System Response						
1	Click on the <b>Contractor</b> button.	The system will display the Contractor screen.						
2	Select the <b>Claims</b> tab.	The system will display the Claims screen.						
3	Search for patient claim.  <b>Note:</b> See View/Search Contract Specific Claimsfor further information.	The system will display patient claims in the list box.						
3	Select the desired patient claim.  <b>Note:</b> Double clicking on the claim will bypass the edit button.							
4	Click on the <b>Edit</b> button.	The Update Claims screen will appear.						
5	Select the appropriate FY contract from the <b>Contract</b> drop-down.							
6	Edit the desired criteria.  <b>Note:</b> One or more criteria may be edited. The user must Tab from the Funding Code field to enable the Update button.	The system will enable the Update button.						
7	<table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Click on the <b>Update</b> button</td><td>The system will update the claim.</td></tr><tr><td>Click on the <b>Cancel</b> button</td><td>The system will not update the claim and will return to the Claims tab</td></tr></table>	If you ...	Then...	Click on the <b>Update</b> button	The system will update the claim.	Click on the <b>Cancel</b> button	The system will not update the claim and will return to the Claims tab	
If you ...	Then...							
Click on the <b>Update</b> button	The system will update the claim.							
Click on the <b>Cancel</b> button	The system will not update the claim and will return to the Claims tab							

## Adjusting a Claim

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The system allows the user to adjust incorrect claims after the monthly submission cut-off date; previously submitted claims **may not** be edited for correction. To verify claims that must be adjusted, perform a claims search (see View/Search Contract Specific Claims for instructions); claims available for adjustment have a "Submit" message of "True". To adjust a submitted claim, a new claim must be added that adds, subtracts or nullifies (i.e., deletes) units as submitted on the original claim.

**Add Claims**

Contract:

Service:

Type	Service	Rate	Units	Start Date	End Date

Service Type:  Rate:

Provider:

Claim Amount:  Claim ID:

Date Entered:  Date Submitted:

Patient:

Service Units:  Service Date:  Funding Code:  ☐ Submitted

**NNA:** Contract \$  Contract Units  YTD Units  Pending Units

CONREP NNA:

Contract ID:

**NR:** Contract \$  YTD \$  Pending \$  Available \$

CONREP NR:

Non-CONREP:

Comments:

Step	Instruction	System Response
1	Click on the <b>Contractor</b> button.	The system will display the Contractor Screen.
2	Select the <b>Claims</b> tab.	The System will display the Claims screen.
3	Click on the <b>Add Claims</b> button.	The Add Claims screen pop up will appear.
4	Select the fiscal year (FY) from the <b>Contract</b> drop-down.	The system will display all the services related to the selected Fiscal Year (FY).
5	Select Service Type from the <b>Service</b> List box.	
6	Select a patient name from the <b>Patient</b> drop-down.	

7	<p>Enter the number of units in the <b>Service Units</b> field and <b>Tab</b> to the next field.</p> <p><b>Note:</b> In this field the user will add units, subtract units or cancel out a previously submitted claim.</p> <table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Previously submitted a claim with too few units</td><td>Enter the additional number of units to adjust the original claim.</td></tr><tr><td>Previously submitted a claim with too many units.</td><td>Enter a negative amount of units to adjust the original claim.</td></tr><tr><td>Previously submitted a claim for an incorrect patient, service type, service month, or funding type.</td><td>Enter a negative amount of units to cancel out the claim and then add a new claim to reflect the correct data.</td></tr></table>	If you ...	Then...	Previously submitted a claim with too few units	Enter the additional number of units to adjust the original claim.	Previously submitted a claim with too many units.	Enter a negative amount of units to adjust the original claim.	Previously submitted a claim for an incorrect patient, service type, service month, or funding type.	Enter a negative amount of units to cancel out the claim and then add a new claim to reflect the correct data.	
If you ...	Then...									
Previously submitted a claim with too few units	Enter the additional number of units to adjust the original claim.									
Previously submitted a claim with too many units.	Enter a negative amount of units to adjust the original claim.									
Previously submitted a claim for an incorrect patient, service type, service month, or funding type.	Enter a negative amount of units to cancel out the claim and then add a new claim to reflect the correct data.									
8	Select a service month from the <b>Service Date</b> drop-down and <b>Tab</b> to the next field.									
9	Select the funding code from the <b>Funding Code</b> drop-down and <b>Tab</b> to the next field.	The system will enable the Add button.								
10	Enter the <b>Comments</b> field.									
	<b>Note:</b> Enter the reason for the adjustment.									
11	Click on the <b>Add</b> button.	The system will add the new claim.								

## Transferring a Patient

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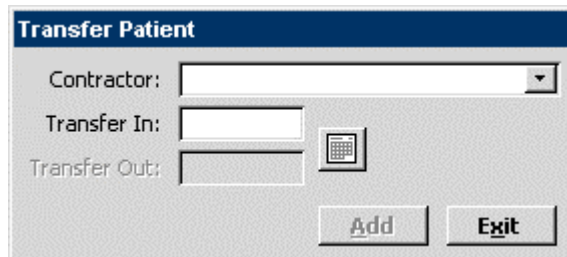
CONREP Providers are required to submit patient transfer information within three business days of such occurrence. A patient transfer will occur when one CONREP Provider assumes supervision and treatment responsibility for another CONREP Providers' patient. The CONREP Provider transferring the patient is responsible for submitting transfer information in the CONREP Data System.

## Adding a New Patient Transfer

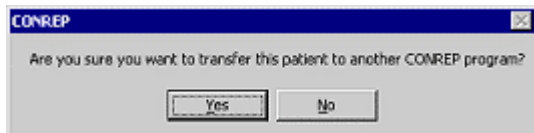
---

Patient transfer information must be entered in the CONREP Data System each time a patient separates from and transfers to another CONREP Program. The system allows the user to add Transfer information by first locating the patient record and then clicking on the Transfer tab for the selected patient. If a patient is transferred in error, contact CONREP Operations for further assistance.

Patient transfers may only occur between CONREP Providers. Patients may not be transferred to or from STRP or IMD Providers.



Step	Instruction	System Response						
1	Select the <b>Patient</b> record.							
	<table><tr><th>If you...</th><th>Then...</th></tr><tr><td>Are going to transfer a patient to another provider</td><td>Go to Step 2</td></tr><tr><td>Just accepted a patient transferred from another provider</td><td>Go to Step 11</td></tr></table>		If you...	Then...	Are going to transfer a patient to another provider	Go to Step 2	Just accepted a patient transferred from another provider	Go to Step 11
	If you...		Then...					
	Are going to transfer a patient to another provider		Go to Step 2					
Just accepted a patient transferred from another provider	Go to Step 11							

2	Select the <b>Transfer</b> tab.	The system will display the Transfer screen.						
3	Click on the <b>New Transfer</b> button	The system will pop up the following message box. 						
4	Click on the <b>Yes</b> button.	The system will enable the Transfer Patient pop up screen.						
5	Select a contractor from the <b>Contractor</b> drop-down.							
6	Click on the Calendar button or type the date in the <b>Transfer In Date</b> field. <table border="1"><thead><tr><th>If you ...</th><th>Then...</th></tr></thead><tbody><tr><td>Click the Calendar button</td><td>Go to step 7</td></tr><tr><td>Type the date manually</td><td>Skip to step 9</td></tr></tbody></table>	If you ...	Then...	Click the Calendar button	Go to step 7	Type the date manually	Skip to step 9	
If you ...	Then...							
Click the Calendar button	Go to step 7							
Type the date manually	Skip to step 9							
7	Select a date from the <b>From</b> Calendar.	The “From” date field at the bottom of the calendar screen will be updated.						
8	Click the <b>Return</b> Button.	The Calendar pop up will close and the Transfer screen will display the selected date in the “Went on Date” drop-down.						
9	Click on the <b>Add</b> button.  Note: Once the transaction is completed, contact the “New” provider so they can input changes to their new patient record.	The system will transfer the patient information to the new Provider.						
10	Select the <b>Care Level/Waiver</b> tab.							
11	Click on the <b>Add Care Level</b> Button.  <b>Note:</b> Care Level effective date is the same day as the transfer in date. (Even if the Care Level remains the same, the new provider is still required to add a new Care Level to reflect the change of Contractor. Care Level effective date is the same day as the transfer in date.)							



12	Select the <b>Info</b> tab.	
13	Change the <b>Residence County</b> , if applicable.  <b>Note:</b> Do not change the Admission Date field as this field reflects the CONREP admission date when patient was with the previous CONREP Provider.	

## Viewing a Patient Transfer

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The system allows the user to view Transfer information by first locating the patient record to be viewed and then clicking on the Transfer tab for the selected patient. Users may only view Transfer information for patients enrolled in their program.

## Editing a Patient Transfer

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Users must contact CONREP Operations prior to editing any patient Transfer. The system allows the user to edit Transfer information by first locating the patient record to be edited and then clicking on the Transfer tab for the selected patient.

Step	Instruction	System Response
1	Select the patient record.	
2	Select the <b>Transfer</b> tab.	The system will display the transfer records.
3	Select the Transfer record to be edited.	

4	<b>If ...</b>	<b>Then...</b>	
	Editing the Contractor field	Select the correct contractor	
	The correct transfer in date is beyond the incorrect one	Key in the correct date	
	The correct transfer in date is prior to the incorrect one	System Admin. role needs to delete the transfer record, and a new transfer record should be added	
5	Click on the <b>Update</b> button.		The system will update the Transfer record.

## Discharge

Whenever a patient is discharged from a CONREP Program, CONREP Providers are required to submit this status change within three business days of such occurrence.

The screenshot displays the CONREP Data System interface. At the top, there are fields for 'Add New Patient/Episode', 'Role' (CONUPDATE), 'Admission ID' (4607), 'C I & I' (M12121212), 'Patient ID' (3459), 'Program Type' (CONREP), 'Care Level' (INTENSIVE), and 'Contractor' (DMH Test Contractor 2). Below these, the 'CONREP Patients' section shows a 'Complete' status. The 'Discharge' tab is selected, showing fields for 'Discharge Date', 'Legal Basis for Discharge', and a list of reasons for discharge: Reoffense, Dangerous, Noncompliance, Decompensation, and Substance Abuse. Each reason has a checkbox and a brief description. At the bottom, there are fields for 'Axis I Primary', 'Axis I Secondary', and 'Axis II', along with an 'Add Discharge Diagnosis' button.

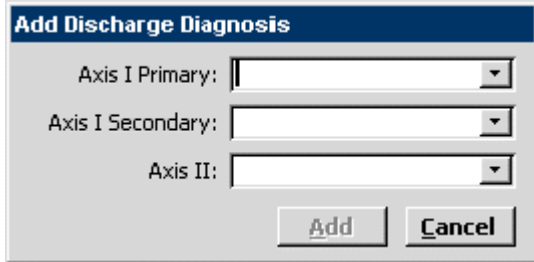
## Discharging a Patient

Discharge status information must be entered in the CONREP Data System each time a patient is discharged from a CONREP Program. The system allows the user to add Discharge information by first locating the patient record and then clicking on the Discharge tab for the selected patient.

Contact CONREP Operations if information needs to be edited or updated on a discharged patient record.

Step	Instruction	System Response
1	Select the <b>Patient</b> record.	
2	Select the <b>Discharge</b> tab.	<p>The following message box will appear.</p>

3	Click on either the <b>Yes</b> or <b>No</b> button.	<table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Click <b>Yes</b></td><td>The discharge screen will appear</td></tr><tr><td>Click <b>No</b></td><td>The system will return to the patient record.</td></tr></table>		If you ...	Then...	Click <b>Yes</b>	The discharge screen will appear	Click <b>No</b>	The system will return to the patient record.
	If you ...	Then...							
	Click <b>Yes</b>	The discharge screen will appear							
	Click <b>No</b>	The system will return to the patient record.							
<table><tr><th>If you ...</th><th>Then...</th></tr><tr><td>Click <b>Yes</b></td><td>Go to step 4.</td></tr><tr><td>Click <b>No</b></td><td>The Discharge becomes nullified.</td></tr></table>		If you ...	Then...	Click <b>Yes</b>	Go to step 4.	Click <b>No</b>	The Discharge becomes nullified.		
If you ...	Then...								
Click <b>Yes</b>	Go to step 4.								
Click <b>No</b>	The Discharge becomes nullified.								
4	Click on the Calendar button or type in the date for the <b>Discharge Date</b> field.  <b>Note:</b> See the <a href="#">Calendar Wizard</a> section for further information.								
5	Select a legal basis from the drop-down								
	<table><tr><th>If the reason for discharge is...</th><th>Then...</th></tr><tr><td>Revocation, Rehospitalization or W&amp;I Code Section 6325B (MDSO)</td><td>Click on one or more of these boxes: Reoffense Dangerous Noncompliance Decompensation Substance Abuse</td></tr><tr><td>Not Revocation, Rehospitalization or W&amp;I Code Section 6325B (MDSO)</td><td>Go to Step 6</td></tr></table>		If the reason for discharge is...	Then...	Revocation, Rehospitalization or W&I Code Section 6325B (MDSO)	Click on one or more of these boxes: Reoffense Dangerous Noncompliance Decompensation Substance Abuse	Not Revocation, Rehospitalization or W&I Code Section 6325B (MDSO)	Go to Step 6	
	If the reason for discharge is...	Then...							
	Revocation, Rehospitalization or W&I Code Section 6325B (MDSO)	Click on one or more of these boxes: Reoffense Dangerous Noncompliance Decompensation Substance Abuse							
Not Revocation, Rehospitalization or W&I Code Section 6325B (MDSO)	Go to Step 6								

6	Click on the <b>Add</b> button.	<p>The following screen will pop up.</p> 
7	<p>Select a Diagnosis from any of the appropriate drop-downs.</p> <p><b>Note:</b> Axis I Primary Diagnosis must be completed.</p>	
8	Click on the <b>Add</b> button.	<p>The system will update the discharge. The patient status is automatically updated to Discharged and the Record Indicator will state "Discharged".</p>

## **Search /View a Discharged Patient's Record**

The system will allow the user to search and view discharged patient records (see [Search/View Patient Records](#) for further information). Users may only search and view discharge records for patients enrolled in their program.

**Discharged** First/MI/Last:

**Info** **Care Level/Waiver** **Diagnosis** **AWOL/NA** **Claims** **Transfer** **Discharge** **History**

Discharge Date:  Legal Basis for Discharge:

☒ **Reoffense** - Revoked/ rehospitalized because of the commission of an offense for which the patient was arrested.

☐ **Dangerous** - Revoked or rehospitalized due to dangerous/threatening behavior.

☐ **Noncompliance** - Revoked/rehospitalized due to program noncompliance or AWOL (other than behaviors covered above).

☐ **Decompensation** - Revoked/rehospitalized due to psychiatric decompensation (bizarre behavior, hallucinations severe depression, breaks with reality, etc.)

☐ **Substance Abuse** - Revoked/rehospitalized because substance abuse was determined.

Axis I Primary:  Axis I Secondary:  Axis II:

## Care Level

All patients are assigned a Care Level upon admission to CONREP based on the CONREP Providers' determination of the required level of treatment and supervision. A patient's care level can change at any time based on their level of functioning while in CONREP.

**Info** **Care Level/Waiver** **Diagnosis** **AWOL/NA** **Claims** **Transfer** **Discharge** **History**

**Care Level**

Care Level Code	Effective Date	End Date	Contractor

**Waivers**

Old Service Code	Old Frequency	New Service	New Frequency	Approved Start	Approved End

## Add New Care Level

Care Level information must be added for every new patient admission or new episode.

Step	Instruction	System Response												
1	Select the <b>Patient Record</b> .													
2	Select the <b>Care Level/Waiver</b> tab.													
3	Click on the <b>Add Care Level</b> button.	The system will display the Add Care Level window.												
4	Select <b>Care Level</b> from drop-down box: <table><tr><th>If care level is...</th><th>Then...</th></tr><tr><td>STRP or IMD</td><td>Continue</td></tr><tr><td>Not STRP or IMD</td><td>Skip to Step 6</td></tr></table>	If care level is...	Then...	STRP or IMD	Continue	Not STRP or IMD	Skip to Step 6	<table><tr><th>If care level is...</th><th>Then...</th></tr><tr><td>STRP or IMD</td><td>Contractor drop down box enable</td></tr><tr><td>Not STRP or IMD</td><td>Contractor drop down box is grayed out.</td></tr></table>	If care level is...	Then...	STRP or IMD	Contractor drop down box enable	Not STRP or IMD	Contractor drop down box is grayed out.
If care level is...	Then...													
STRP or IMD	Continue													
Not STRP or IMD	Skip to Step 6													
If care level is...	Then...													
STRP or IMD	Contractor drop down box enable													
Not STRP or IMD	Contractor drop down box is grayed out.													
5	Select a Contractor from the <b>Contractor</b> drop-down box.  <b>Note:</b> If a patient is moved from one STRP facility to another STRP facility, the CONREP Provider must add a new Care Level and select the new STRP Provider to allow both STRP Providers to submit claims for that patient.													

6	Click on the Calendar button or type in the date for the <b>Effective Date</b> field.  <b>Note:</b> See the <a href="#">Calendar Wizard</a> section for further information.	
7	Hit the <b>Tab</b> Key.	The system will enable the Add button.
8	Click on the <b>Add</b> button	The system will add the new Care Level to the Care Level/Waiver tab. The system will also auto-fill an End Date for the previous care level (except Care Level at first admission.)

## View Care Level

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The system allows the user to view Care Level information by locating the patient record to be viewed and then clicking on the Care Level/Waiver tab for the selected patient. Users may only view Care Level information for patients enrolled in their program.

Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Select the <b>Care Level</b> tab.	
3	Click on the <b>Column Header</b> .	The system will sort the records in ascending order by Column Title.

## Edit/Update Care Level

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Care Level information may be edited for corrections and must be updated as a patient moves between care levels. The system allows the user to edit Care Level information by locating the patient record to be edited and then clicking on the Care Level/Waiver tab for the selected patient. If a Care Level is entered in error, contact CONREP Operations for further assistance.



**Update Care Level**

Care Level: **INTENSIVE**

Contractor: **DMH Test Contractor 2**

Effective Date: **04/01/2003**

End Date: **04/01/2003**

**Update** **Exit**

Step	Instruction		System Response
1	Go to the <b>Patient Record</b> .		
2	Go to the <b>Care Level</b> tab.		
3	Double-click on the <b>Care Level Record</b> to be updated.		The system will display the Update Care Level screen.
4	<b>If you Update the...</b>	<b>Then ...</b>	
	Care Level	Select a care level from the <b>Care Level</b> drop-down box.	
	Effective Date	Click on the Calendar button or type in the date for the <b>Effective Date</b> field.  <b>Note:</b> See the <a href="#">Calendar Wizard</a> section for further information.	
5	Click on the Update button.		The system will update the Care Level record for the patient.

## Waivers

A Waiver of Core Service is a process that allows for deviation from core service standards, including substitution of an alternative service, lowering of service frequency or deletion of a service requirement. CONREP Operations sets

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frequencies in the CONREP Data System for specified patients based on waivers submitted by CONREP Providers that are approved by CONREP Operations

Users will add NNA/Core Service claims, based on approved frequencies and timelines, as entered in the Care Level/Waiver tab by CONREP Operations.

## Viewing Waivers

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Users may view patient specific Waiver status by accessing the Care Level/Waiver tab. If a Waiver has been denied by CONREP Operations, users will see a “Denied Flag” in the Waiver record. Users may only view Waivers for patients enrolled in their program.

The screenshot shows a web interface titled "Waivers". At the top right are two buttons: "Add Waivers" and "Delete Waivers". Below these is a table with the following column headers: "Service Group", "Service Codes", "Old Frequency", "New Frequency", "Approved Start", and "Approved End". The table body is currently empty.

Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Select the <b>Care Level/Waiver</b> tab.	
3	Click on <b>Care Level Record</b> .	The system will display all waivers related to that care level for the patient.
4	Click on the <b>Column Headers</b> .	The system will sort the waivers in ascending order by the Header title.

## History

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The History screen displays specified patient status and demographic information changes and their date of change, which is based on users' data entry updates. The History screen fields are read-only and may not be edited.

Add New Patient/Episode | Role: CONUPDATE | Admission ID: 4607 | C I & I: M12121212 | Patient ID: 3459 | Program Type: CONREP | Care Level: INTENSIVE | Contractor: DMH Test Contractor 2

**CONREP Patients** | Complete | First/Middle/Last: JOHN | DOE

Last Name: | or C I & I: |

Show All | Advanced... | Find

C I & I	Patient Name	Adm Date
CII	Patient Name	

AKAs | Other IDs

Info | Care Level/Waiver | Diagnosis | AWOL/NA | Claims | Transfer | Discharge | History

Change Date	Effective Date	User	Changed Field	New Value	Old Value	History ID
05/01/2003	05/01/2003	TestUser_CI	ETHNICITY COI 8		3	33151
04/30/2003	04/30/2003	dbo	CII	M12121212	M12121212	33141
04/30/2003	04/30/2003	dbo	CII	M12121212	M12121212	28969
04/29/2003	04/29/2003	TestUser_CI	Admission Stab:	Active	Active	24797
04/29/2003	04/29/2003	TestUser_CI	Admission Stab:	Active	Active	24794
04/29/2003	04/29/2003	TestUser_CI	Care Level:	INTENSIVE	INTENSIVE	24795
04/29/2003	04/29/2003	TestUser_CI	Residence Cou:	Amador	Amador	24796
04/29/2003	04/29/2003	TestUser_CI	Admission Stab:	Active	Active	24791
04/29/2003	04/29/2003	TestUser_CI	Care Level:	INTENSIVE	INTENSIVE	24792
04/29/2003	04/29/2003	TestUser_CI	Residence Cou:	Amador	Amador	24793
04/29/2003	04/29/2003	TestUser_CI	Admission Stab:	Active	Active	24788
04/29/2003	04/29/2003	TestUser_CI	Care Level:	INTENSIVE	INTENSIVE	24789
04/29/2003	04/29/2003	TestUser_CI	Residence Cou:	Amador	Amador	24790
04/29/2003	04/29/2003	TestUser_CI	CONTRACTOR:	DMH Test Contra	DMH Test Contra	24787

Comments: | Font Size: 3

## Adding Patient History Footnotes

The History screen contains a Comments field that allows users to document the reason for any data entry changes. To add comments to a patient record, first locate the patient record and then click on the History tab and add relevant information.

Comments: | Font Size: 3

Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Select the <b>History</b> tab.	The system will display the history for the patient's record.
3	Enter comments in the <b>Comments</b> field as necessary.	

## Viewing Patient History

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The system allows the user to view patient history information by first locating the patient record to be viewed and then clicking on the History tab for the selected patient. Users may only view History information for patients enrolled in their program.

Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Select the <b>History</b> tab.	The system will display the history for the patients record.
3	Click on the <b>Column Headers</b> .	The system will sort the records in ascending order by Column title.

## Other IDs/CI&I

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Other ID's is an optional field where users can enter a patient's Social Security number if desired.

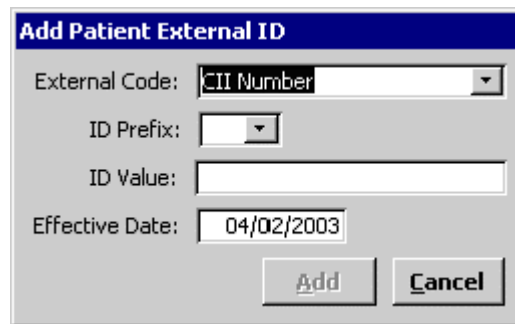
Changes to CI&I numbers must be entered in the Other ID field. A CI&I number may be changed by Department of Justice if that patient's CI&I number is purged or the CI&I prefix (i.e., prefixes "M" or "H") is automated.

The screenshot shows a software window titled "Patient ID's" with a standard Windows-style title bar (minimize, maximize, close buttons). The window contains a form with several input fields and buttons. At the top, there are five fields: "Prefix" (a dropdown menu), "Value" (a text box), "External Code" (a dropdown menu), "Eff. Date" (a date field showing "09/20/1999"), and "Exp. Date" (a date field). Below these fields is a "Delete" button. At the bottom right of the window are two buttons: "Add" and "Exit". The main area of the window is a large, empty text box.

## Add IDs/CI&I

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The system allows the user to enter Social Security numbers and CI&I number changes by first locating the patient record and then clicking on the Other IDs button for the selected patient.



Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Click on the <b>Other IDs</b> button.	The system will display the Patient ID screen.
3	Click on the <b>Add</b> button.	The system will display the Add Patients External ID screen.
4	Select the external code from the <b>External Code</b> drop-down box.	
5	Select the ID prefix from the <b>ID Prefix</b> drop-down box.  <b>Note:</b> A prefix must be selected if the External Code is a CI&I number.	
6	Enter ID value in the <b>ID Value</b> field.  <b>Note:</b> CI&I numbers must be 8 digits.	
7	Click on the Calendar button or type in the date for the <b>Effective Date</b> field.  <b>Note:</b> See the <a href="#">Calendar Wizard</a> section for further information.	
8	Click the <b>Add</b> button.	The system will update the patient's record.

## View IDs/CI&I

---

The system allows the user to view Other ID's/CI&I information by locating the patient record to be viewed and then clicking on the Other ID's button for the selected patient. Users may only view Other ID's/CI&I information for patients enrolled in their program.

Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Click on the <b>Other IDs</b> button.	The system will display the Patient ID screen.

## Edit IDs/CI&I

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The system allows the user to edit Other ID's/CI&I information by locating the patient record to be edited and then clicking on the Other ID's button for the selected patient.

If Other ID's or CI&I numbers are entered in error, contact CONREP Operations for further assistance.

Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Click on the <b>Other IDs</b> button.	The system will display the Patient ID screen.
3	Click on the <b>Add</b> button.	The system will display the Add Patients External ID screen.
4	Select the external code from the <b>External Code</b> drop-down box.	
5	Select the ID prefix from the <b>ID Prefix</b> drop-down box  <b>Note:</b> A prefix must be selected if the External Code is a CI&I number.	
6	Enter ID value in the <b>ID Value</b> field.  <b>Note:</b> CI&I numbers must be 8 digits.	

7	Click on the Calendar button or type in the date for the <b>Effective Date</b> field.  <b>Note:</b> See the <a href="#">Calendar Wizard</a> section for further information.	
8	Click on the <b>Add</b> button.	The system will update the patient's record.

## AKA

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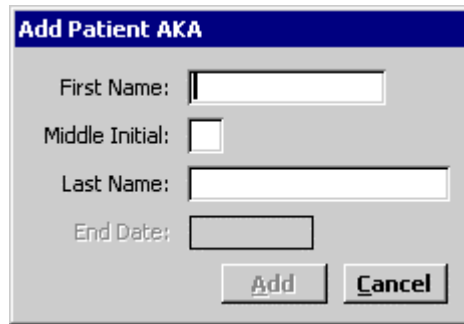
The acronym AKA (i.e., “also known as”) refers to other names that an individual is known by. If a CONREP patient has AKA’s, those names will typically appear on that patient’s Rap Sheet.

The screenshot shows a software window titled "Patient AKA's". At the top, there are three input fields labeled "First Name", "Last Name", and "End Date". Below these fields is a "Delete" button. At the bottom right of the window are "Add" and "Exit" buttons. The central part of the window is a large, empty rectangular area, likely for displaying a list of AKA records.

## Add AKA

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The system allows the user to enter patient AKA names by first locating the patient record and then clicking on the AKAs button for the selected patient. A feature of the AKA function is that the last AKA name entered is the name that will display on the patient record and CONREP Data System reports (e.g., CRP 505 report, etc.). If the user wants to change the name appearing on the CONREP Data system and Reports, another AKA record can be entered with the desired name.



The image shows a software dialog box titled "Add Patient AKA". It contains four input fields: "First Name:" with a text box, "Middle Initial:" with a small text box, "Last Name:" with a text box, and "End Date:" with a date picker. At the bottom right, there are two buttons: "Add" and "Cancel".

Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Click on the <b>AKAs</b> button.	The Patient AKA's screen will appear.
3	Click on the <b>Add</b> button.	The Add Patient AKA pop up will appear.
4	Complete the following fields: <ul style="list-style-type: none"> <li>- <b>First Name</b></li> <li>- <b>Middle Initial (Optional)</b></li> <li>- <b>Last Name</b></li> </ul>	
5	Hit the <b>Tab</b> key.	The Add button becomes enabled.
6	Click on the <b>Add</b> button.	The system will update the patient's AKA.

## View AKA

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The system allows the user to view AKA information by locating the patient record to be viewed and then clicking on the AKA button for the selected patient. Users may only view AKA information for patients enrolled in their program.

Step	Instruction	System Response
1	Select the <b>Patient Record</b> .	
2	Click on the <b>AKAs</b> button.	The System will display the patient's AKA's screen.



## Current Contractor Information

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The Current Info tab in the Contractors Screen displays location and contact information for both active and inactive CONREP Providers and their associated subcontractors.

The screenshot shows the 'CONREP Contractors' application window. At the top, there is a search bar labeled 'Find Contractor:' with 'DMH Test Contractor 2' entered. To the right of the search bar is an 'Advanced...' button. Below the search bar are four radio buttons: 'Prime/IMD Contractors' (selected), 'Sub Contractors', 'STRP's', and 'All Contractors'. Below these are two text boxes: 'Contractor: DMH Test Contractor 2' and an 'Add Contractor' button. The main content area has a tabbed interface with 'Current Info' selected. The 'Current Info' tab displays the following information for 'DMH Test Contractor 2':

Contractor Name: DMH Test Contractor 2	
Email Address:	Contractor No.: DMH2
Phone: (916) 999-9999	Fax: (916) 999-9999
Contractor ID: 230	
Street Address: 123 Main Street	
City: Pleasantville	State: CA
Zip: 94123	
Region: Valley	Status: ACTIVE
Type: Other	Role: prime
Status Date: 07/04/2002	
County: Sacramento	

## View/Search Current Contractor Information

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The system allows the user to view contract information by first clicking on the Contracts tab, and then clicking on the selected FY contract to view associated NNA and NR contract services. Users may only view contract information for their program.

## Contracts

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The Contracts tab in the Contractor screen contains information on all CONREP Provider contracts and their associated NNA and NR services.

Current Info Contracts Patients Claims Contracts Contractor: DMH Test Contractor 2 Add Contractor

FY	Total Contract	NNA \$ Contract	Total NR \$	NR Ceiling	NR \$ YTD	Capacity	Contract #	NNA Units	MMA Units YTD	Start Date	End Date
2002	\$150000.00	\$100000.00	\$50000.00	\$50000.00		10	02-99999	0		7/1/2002	6/30/2003

Rate (\$)	Max Units	NR/MMA Type	Service Code	Start Date	End Date	Contractor
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Service \$: Add New Service Delete Service Edit Service Add Contract Edit Contract

## View Contracts

CONREP Providers may view FY contracts by selecting the Contracts tab from the Contractor Screen. Users may only view contract information for their program.

CONREP Contractors Find Contractor: DMH Test Contractor 1 Advanced...

☒ Prime/IMD Contractors ☐ Sub Contractors ☐ STRPs ☐ All Contractors

Current Info Contracts Patients Claims Contracts Contractor: DMH Test Contractor 1 Add Contractor

FY	Total Contract	NNA \$ Contract	Total NR \$	NR Ceiling	NR \$ YTD	Capacity	Contract #	NNA Units	NNA Units YTD	Start Date	End Date
2002	\$150000.00	\$100000.00	\$50000.00	\$50000.00		10	02-99999	0		7/1/2002	6/30/2003
2001	\$150000.00	\$100000.00	\$50000.00	\$50000.00		10	01-99999	0		7/1/2001	6/30/2002

Rate (\$)	Max Units	NR/MMA Type	Service Code	Start Date	End Date	Contractor
\$0.00	0	NNA	05/10	7/1/2002	6/30/2003	

Service \$: \$0.00 Add New Service Delete Service Edit Service Add Contract Edit Contract

## Contacts

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The Contacts tab contains key administrative and/or clinical personnel contact information for all current CONREP Providers.

The screenshot displays the 'CONREP Contractors' web application interface. At the top, there is a header with the title 'CONREP Contractors' and a dropdown menu for 'Find Contractor:' set to 'DMH Test Contractor 2'. Below this, there are radio buttons for 'Prime/JMD Contractors' (selected), 'Sub Contractors', 'STRP's', and 'All Contractors'. A 'Contractor:' field also shows 'DMH Test Contractor 2'. The main navigation bar includes tabs for 'Current Info', 'Contracts', 'Patients', 'Claims', and 'Contacts' (which is active). The 'Contacts' tab displays a form for a contractor named John M. Smith. The form is organized into columns: Name (First: John, MI: J, Last: Smith), Address (Street: 123 Main Street, City: Pleasantville, State: CA, Zip: 94123), Phone / Fax / Email (Phone: (916) 999-9999, Fax: (916) 999-9999, Email: smith@aol.com), and Start Date / End Date / UserID (Start: 04/28/2003, End: , User ID: TestUser\_CU2). There are 'Delete' and 'Add Contact' buttons. An 'Advanced...' button is located in the top right corner.

Name		Address		Phone / Fax / Email		Start Date / End Date / UserID	
First:	John	Street:	123 Main Street	Phone:	(916) 999-9999	Start:	04/28/2003
MI:	J	City:	Pleasantville	Fax:	(916) 999-9999	End:	
Last:	Smith	State:	CA	Zip:	94123	Email:	smith@aol.com
						User ID:	TestUser_CU2

## View Contact

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CONREP Provider contact information may be viewed by selecting the Contacts tab from the Contractor Screen. Users may only view contact information for their program

## Reports

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A variety of CONREP Data (CRP) System reports are available for viewing and printing via the Reports Screen. The CRP Reports compile patient and claim data submitted by CONREP Providers and are a means by which CONREP Providers can monitor service utilization and contract compliance. CONREP Providers should print reports monthly on the 16<sup>th</sup> of the month or the first working day thereafter to monitor for both timeliness and quality of submitted data and to ensure compliance with contract specifications.

## Preparing/Printing Reports

The system allows the user to prepare, view and print reports specific to their program by accessing the Reports Screen.

Step	Instruction	System Response
1	Click on the <b>Reports</b> Button	The system will display the Reports Screen
2	Click on the <b>Prepare Report</b> Button  <b>Note:</b> The system will default to the Prepare Report Button when opening the Reports Screen	The system will display the Prepare Report screen
3	Click on the <b>Reports</b> drop-down	The system will display a report menu
4	Select the desired report	The system will display a parameter and parameter value (if applicable)

5	<b>If you ...</b>	<b>Then...</b>	
	Want to change the <b>Parameter Value</b>	Go to step 6	
	Want to keep the default parameter	Go to step 8	
6	Click on the <b>Edit</b> button		The system will allow the Parameter Value to be changed
7	Click on <b>Save Record</b> button  <b>Note:</b> clicking on the cancel button will cancel the previously entered Parameter Value.		The system will save the new Parameter.
8	Click on the <b>Immediate Print Preview</b> button  <b>Note:</b> use the navigator to scroll and view report pages.		The system will display the selected report
9	<b>If you ...</b>	<b>Then...</b>	
	Click on the <b>Print</b> Icon	The system will print the selected report in its entirety	
	Click on the <b>File menu</b> option and click on the <b>Print</b> Icon	The system will allow the user to print selected pages of the report	
	Click on the <b>Close Report</b> button	The system will close the selected report and return to the Prepare Report screen	

## Trouble-Shooting

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<ul style="list-style-type: none"><li>• <b>Screen freezes up when performing transaction</b></li></ul>	Click on the Esc Key to cancel the transaction and data entry again.
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